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ABSTRACT

This book was originally produced in England as part of a self-instructional package designed as an introduction to the course for the Certificate in Management Studies. The package includes a number of self-assessed activities and is expected to take about 20 hours to complete. The course materials are organized in three sections covering the following topics: (1) approaches to an understanding of management; (2) management activities--analyzing the job description; and (3) organizational structures. Each section contains objectives, information, examples, references to activities contained in an accompanying book of supplementary material, references to a required textbook and other sources, and conclusions. Material is illustrated with line drawings and charts. (KC)

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HOW DO I MANAGE?

AN INTRODUCTION TO MANAGEMENT

AN INTRODUCTORY PACKAGE TO THE CERTIFICATE IN MANAGEMENT STUDIES

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HOW DO I MANAGE ?

This book and associated materials were prepared by a course team from the Lancastrian School of Management, and the Centre for Educational Technology, Preston (now Lancashire) Polytechnic, and revised by the North West Regional Management Centre.
Most recent revision : 1985

The Course team gratefully acknowledges the encouragement and advice given by the Council for Educational Technology in the preparation of this material, and particularly the help given by Mr. J. A. Coffey and Mr. C. Neville.

HOW DO I MANAGE ?

This book was originally produced as part of a self-instructional package designed as an introduction to the course for the Certificate in Management Studies.

In addition to this volume there is a book of supplementary materials and a set text book, details of which appear on the following page.

The package includes a number of self assessed activities, and is expected to take about 20 hours to complete.

The package in its original form was supported by a programme of seminars designed to build on the concepts developed in the text and activities, and continuous tutorial support was available through the course leader.

If you are using the package as part of an organised course please keep the results of the activities and exercises you undertake for discussion with your tutors and fellow students.

SET BOOK

The set-book for this course is the eighth edition of:

"MANAGEMENT"

by

Harold Koontz
Cyril O'Donnell and
Heinz Weihrich

published in 1984 by
McGraw-Hill International.

Footnotes in the text refer to appropriate sections of the set-book for the assistance of readers who wish to follow up topics of interest in greater detail.

CONTENTS

		PAGE
SECTION 1	APPROACHES TO AN UNDERSTANDING OF MANAGEMENT.	5
SECTION 2	MANAGEMENT ACTIVITIES - ANALYSING THE JOB DESCRIPTION.	29
SECTION 3	ORGANISATIONAL STRUCTURES	52

SECTION 1

APPROACHES TO AN UNDERSTANDING OF MANAGEMENT

OBJECTIVES

On Completion of this section you should be able to:

i) define the terms "ORGANISATION" and "MANAGER".

ii) identify a number of approaches to the study of management and describe the significant features of each.

iii) explain the major contributions each approach makes to the contingency approach to management.

1. APPROACHES TO AN UNDERSTANDING OF MANAGEMENT

1.1 DEFINING THE TERMS

Over the years a number of attempts have been made to provide a theoretical framework within which the activities of a manager might be better understood. In this section the main features of some of these models are described. However, before proceeding to look at them we need first to establish the meaning of two important terms. These are:-

"ORGANISATION" and "MANAGER".

i) What is an Organisation?

Organising is a purposeful activity. People organise in order to get things done. This is equally true of the person running a car factory, a hospital ward, or selling apples on the market.

To be carried out successfully all these jobs require organisation. But do they all take place within an organisation?

Certainly the first two do. Many people work at a car factory, employed on different jobs, but so organised that they achieve the common purpose of producing cars. Similarly the workers in a hospital co-ordinate their skills in order to produce a service for the patient.

What about the man selling apples? He may have a stall on the market where there are lots of other stalls and he will buy his fruit from the wholesaler

in the same way as many other stall holders. But although he does not work in isolation, he does work independently. If he is ill his stall is closed, and it may be used by another trader to sell something else. To be successful he must be organised, set his stall out neatly, have a good supply of fruit, etc, but he can do it all himself. He need not belong to an organisation.

So what is an organisation?

An organisation exists if people consciously combine their efforts for a common purpose. (1)

ii) What is a Manager?

A manager works in an organisation. Management is the other side of the organisation coin; you cannot have one without the other.

A manager is concerned with the efficiency of the organisation in seeing that it achieves its purpose.

Few people in an organisation are purely managers, but many people have an element of management in their job. The proportion of management content to technical content tends to increase as an individual rises in the management hierarchy. This tendency is illustrated in figure 1.1.

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(1) Set Book p. 230

but note also other uses of the term 'organisation'.
Set Book Glossary, page 662

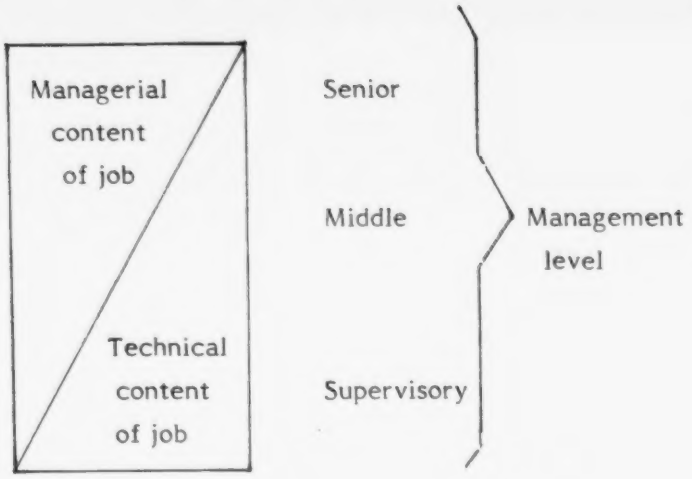


Figure 1.1

Proportions of managerial and technical content of jobs at different levels of the management hierarchy.

The stall holder on the market, selling apples, is not a manager. He is not a member of an organisation. His concern is with doing things; what he does not do, is not done! If he sleeps in late, he will miss the wholesale market. If he leaves his stall to go for a cup of tea or more fruit, a customer cannot be served.

In fact most stall holders do belong to an organisation; on any but the smallest stall some people sell the fruit, others bring fresh supplies etc. As soon as an assistant is employed there is a need for a manager. As the business grows more time has to be spent organising the work of others. This is a manager's job - seeing that the conditions are right for others to do their job effectively so that the purposes of the organisation are achieved.

NOW COMPLETE **ACTIVITY A** ON PAGE 1

OF THE BOOKLET OF SUPPLEMENTARY MATERIAL.

iii) Who Manages?

In most organisations managerial responsibility is given only to those who first of all have some proven technical competence. For example, a Production Superintendent must also be a competent engineer. But although a person may be good at doing a job (technically efficient) it will not always follow that the same person will be equally good at getting jobs done (managerially efficient).

Many managers particularly as they reach more senior positions, will be concerned with many technical disciplines, few of which they will know about in any depth.

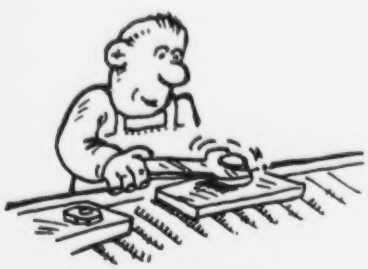
Our market trader may be very successful so long as he does everything himself but he may be unprepared to meet the challenge of running an organisation.

1.2 THE SCIENTIFIC APPROACH TO MANAGEMENT

An early attempt to improve managerial efficiency was that associated with the work of F.W. Taylor (1856-1917).[1] Fundamental to Taylor's way of thinking was an insistence upon specialisation of function and the removal of all extraneous elements and activities from a worker's job so that he could concentrate on the essential task. By adopting a "scientific approach" to the study of work the best method of doing it would be revealed.

Consider this simple illustration of the scientific approach. Many jobs in offices can be done by one person, but others require the efforts of more than one worker. By a careful analysis of all the jobs to be done it should be possible for staff to be deployed with the maximum efficiency. Efficient deployment should ensure that no one has to wait for assistance or is left struggling to do a job that could better be done by two people.

Equally when working as an individual, jobs would be allocated that could be done without assistance.



In order to establish what makes up this state of maximum efficiency the "scientific approach" requires experimentation. This could for example involve trying different numbers of staff and different proportions of qualified to unqualified staff etc., on a given task. The experiment would be allied to the careful keeping of records which would then be subjected to careful analysis. As a result of this analysis the "one best method" of completing the task should emerge.

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(1) Set Book pp. 30 - 32

If it was necessary to determine the best height for working surfaces, the location of cabinets and the disposition of equipment, the scientific approach would require data to be collected on a number of relevant facts, such as the average height of workmen, patterns of movement in the workplace, contents of cabinets, etc.

All our lives have been much affected by analyses of this sort. These are reflected in the design of buildings and cars, the range of tools and instruments available to us and in many other situations.

NOW TURN TO **ACTIVITY B** ON PAGE 6 OF THE BOOKLET OF SUPPLEMENTARY MATERIAL.

The scientific study of work does not produce answers so much as a range of alternatives between which the manager can choose. But of course the choice must also be made on a scientific basis and must be justified by improved results in the same way that the study of work produces more efficient methods to choose from. The manager seeks to choose the "one best method".

The emphasis throughout the scientific approach is on the analysis of operations and events into their constituent parts, so that each part can be measured, and the contribution it makes to the whole assessed.

1.3 THE PROCESS APPROACH

i) FAYOL'S "ELEMENTS OF MANAGEMENT".

As we have seen, the scientific approach to management involves the measurement of key variables and an insistence on a logical approach, which demands answers to such questions as:

What is the purpose of this activity?

Where does it occur?

How should it be carried out?

Complementary to this approach is the so called "PROCESS" model associated with Henri Fayol, (1841 - 1925).

Fayol defined management in terms of five functions, or elements. (1)

(a) Forecasting and planning

(b) Organizing

(c) Commanding

(d) Co-ordinating

(e) Controlling.

A manager's job is to predict or forecast what is going to happen in the future and to plan accordingly.

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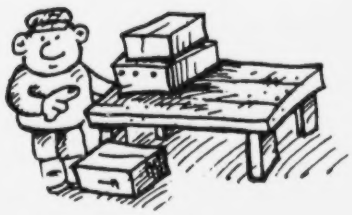
(1) Set book p. 37

Returning to the market trader, from the comments of his customers he might predict that he could sell a greater variety of fruit. In order to do so he plans to enlarge his stall, employ more staff and so on. Having made his prediction and formulated his plan, he must implement it. This involves organising the enlargement of his stall, allocating storage space, siting the tills and engaging his staff.



He has now constructed a system capable of selling a variety of fruit. But having constructed the system there is no guarantee that it will achieve its objective. To ensure the achievement of the objective the trader needs to ensure that the displays are maintained, that the staff are serving customers, not just chatting to friends, and that they are putting money in the till rather than taking it out. In other words he has to motivate them to achieve his purposes. This is the function of command.

Of course not all the fruit will be kept on the stall; there will be stocks in reserve for replenishing displays as customers buy goods. The task of bringing forward these reserves must be carefully co-ordinated with the rate at which goods are being sold.

It is not enough that everyone works hard. Their efforts must supplement those of their colleagues and not impede them.

Finally, for the purposes of control, our stall holder will want to know if he is still making a profit, or whether the increase in his takings is being swallowed up in wages. Is the organisation working for the

purposes for which it was designed? Can it be modified so that those objectives can be better achieved? In the light of experience are they the best objectives?

And so we return to the function of prediction and planning with which we began. Rather than functions we could have called the five elements 'processes', and the approach just described is often called the process model of management.

ii) FAYOL'S "PRINCIPLES" OF MANAGEMENT.

It is one thing to say what the processes of management are, but quite another to say how they should be performed. What principles are there to guide the manager in his work of planning, organizing, co-ordinating, etc?

Fayol suggested a number of rules or principles that a manager might take into account when faced with a problem or decision. The same principles could also be used when faced with the problem of accounting for the failure of an organisation. In this situation one might look to see if any of the principles had been violated.

A detailed description of the principles(1) would be out of place in this introductory unit but they cover such matters as the division of work, authority and responsibility, remuneration, order, equity and initiative. Particularly influential has been the principle of unity of command: the argument that each employee should have only one person to report to, so that there are no divided loyalties or contradictory commands.

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(1) For further details set Set Book pp. 35 - 37

The ideas of Fayol and writers using the scientific approach, have significantly influenced much that has been written about management. Work in this tradition is often referred to, collectively, as the classical approach to management.

1.4 THE HUMAN RELATIONS APPROACH

The classical approach to management has the virtue of relative simplicity. However, management, like life, is rarely as simple as it seems.

Remember, management is concerned with people. In our example, the market trader on his own is not a manager.

He has to worry about relations with his customers and his suppliers, but that is all, and he can work as he pleases. But a manager might follow all the precepts of the classical approach to management and still find his organisation failing because the people, though technically qualified and skilled, do not get on with each other.

Numerous studies have shown that the social relationship that people develop at work and the expectations they bring with them, are powerful influences that must be considered by managers.

Many employees, for instance, might find it difficult to accept instructions from a young person that they would regard as perfectly reasonable from an older one. Equally technical innovations that split up working groups can lead to feelings of isolation, and result in a loss of production rather than the expected increase.(1)

So important do many management writers consider this human factor that it is possible to identify a human relation approach(2) to management. Rather than concentrating on an examination of the nature and conditions of work, or principles of management, the emphasis is on the formation of social groups and the development of attitudes.

(1) See for example the work of Trist on the introduction of the long wall method of coal getting. Set book p.57.

(2) The pioneering work of Elton Mayo in the Hawthorne plant of the Western Electric Company is significant in this context. See Set book p.40.

1.5 THE CONTINGENCY APPROACH TO MANAGEMENT

Practising managers and writers on management have, over the years, attempted to apply the approaches to management outlined in the previous paragraphs.

Which approach or combination of approaches was adopted by a particular manager depended on a number of factors, including the type of formal management training he had received and the "folk-lore" of management handed down from one generation of managers to another.

Results in practice tended to be disappointing. Articles in management journals abound with apparent contradictory reports on the application of one or another approach to management. What worked for one person did not work for another. What produced success in one organisation produced less satisfactory results in another organisation.

No single approach seemed adequate to cope with all the problems of management.[1] In adopting a human relations approach to management, difficulty was experienced with operational problems. For example, how much plant, machines, and labour should be provided in order to produce the desired output or level of service. The human relations approach tells us about social relationships and not about investments in machines or how long it is before they wear out or become obsolete. Similarly it was found that if one used a scientific approach to management, calculations based on analysis could

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(1) Set Book p.13

provide the answers to questions such as required investment in machines, obsolescence rates, rated outputs and so on. What it could not answer were questions about employees as social beings. Calculations could be made regarding the location of buildings and equipment so that work could be performed in the most economic manner. Unfortunately the scientific approach could give little guidance about the manner in which employees would react to working arrangements. Similar deficiencies were observed in the process approach.

An increasing number of managers have thus come to believe that no single existing approach to management can have all of the answers to all of the questions, all of the time for all situations.

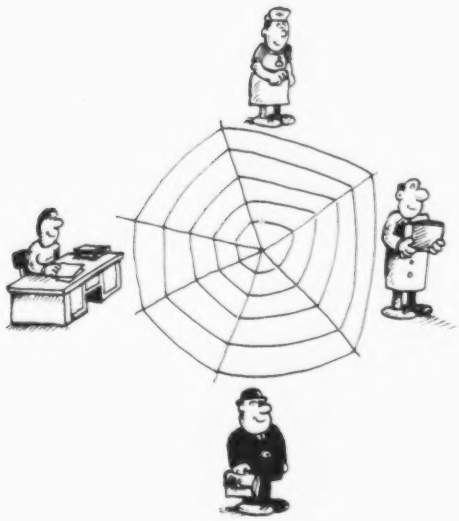
In the late 1960s and early 1970s ideas began to emerge based on observations about the way in which existing approaches seemed to be true under one set of circumstances and not true in another. It seemed that the best approach to management was dependent upon the precise conditions applying in a particular situation. By combining existing perspectives on management into a complementary and inter-dependent whole the Contingency Approach to management emerged.

Figure 1.2 shows the relationships between the various approaches to management.

In essence the Contingency Approach is based on the view that the application of management principles and practices should be contingent upon the total existing circumstances of:-

- the organisation and its technology
- the environment in which it exists.
- the work groups involved
- the individuals involved.

Figure 1.3. illustrates this view



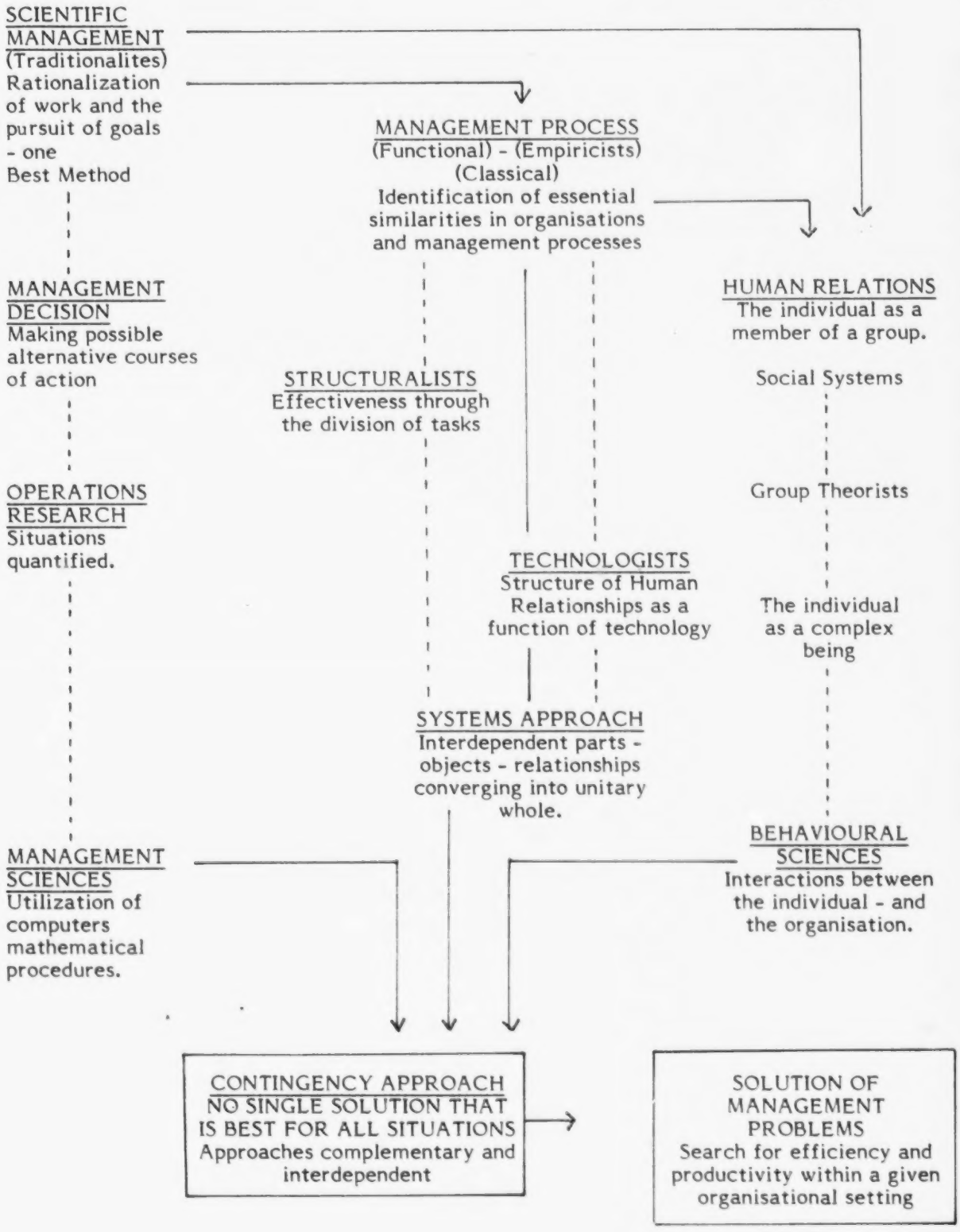

SCIENTIFIC MANAGEMENT
(Traditionalites)
Rationalization of work and the pursuit of goals - one Best Method
MANAGEMENT PROCESS
(Functional) - (Empiricists)
(Classical)
Identification of essential similarities in organisations and management processes
HUMAN RELATIONS
The individual as a member of a group.
Social Systems
Group Theorists
The individual as a complex being
MANAGEMENT DECISION
Making possible alternative courses of action
STRUCTURALISTS
Effectiveness through the division of tasks
OPERATIONS RESEARCH
Situations quantified.
TECHNOLOGISTS
Structure of Human Relationships as a function of technology
SYSTEMS APPROACH
Interdependent parts - objects - relationships converging into unitary whole.
MANAGEMENT SCIENCES
Utilization of computers mathematical procedures.
BEHAVIOURAL SCIENCES
Interactions between the individual - and the organisation.
CONTINGENCY APPROACH
NO SINGLE SOLUTION THAT IS BEST FOR ALL SITUATIONS
Approaches complementary and interdependent
SOLUTION OF MANAGEMENT PROBLEMS
Search for efficiency and productivity within a given organisational setting

FIGURE 1.2 OUTLINE OF RELATIONSHIP OF SCHOOLS OF MANAGEMENT THOUGHT SHOWING THEIR CONTRIBUTIONS TO THE CONTINGENCY APPROACH

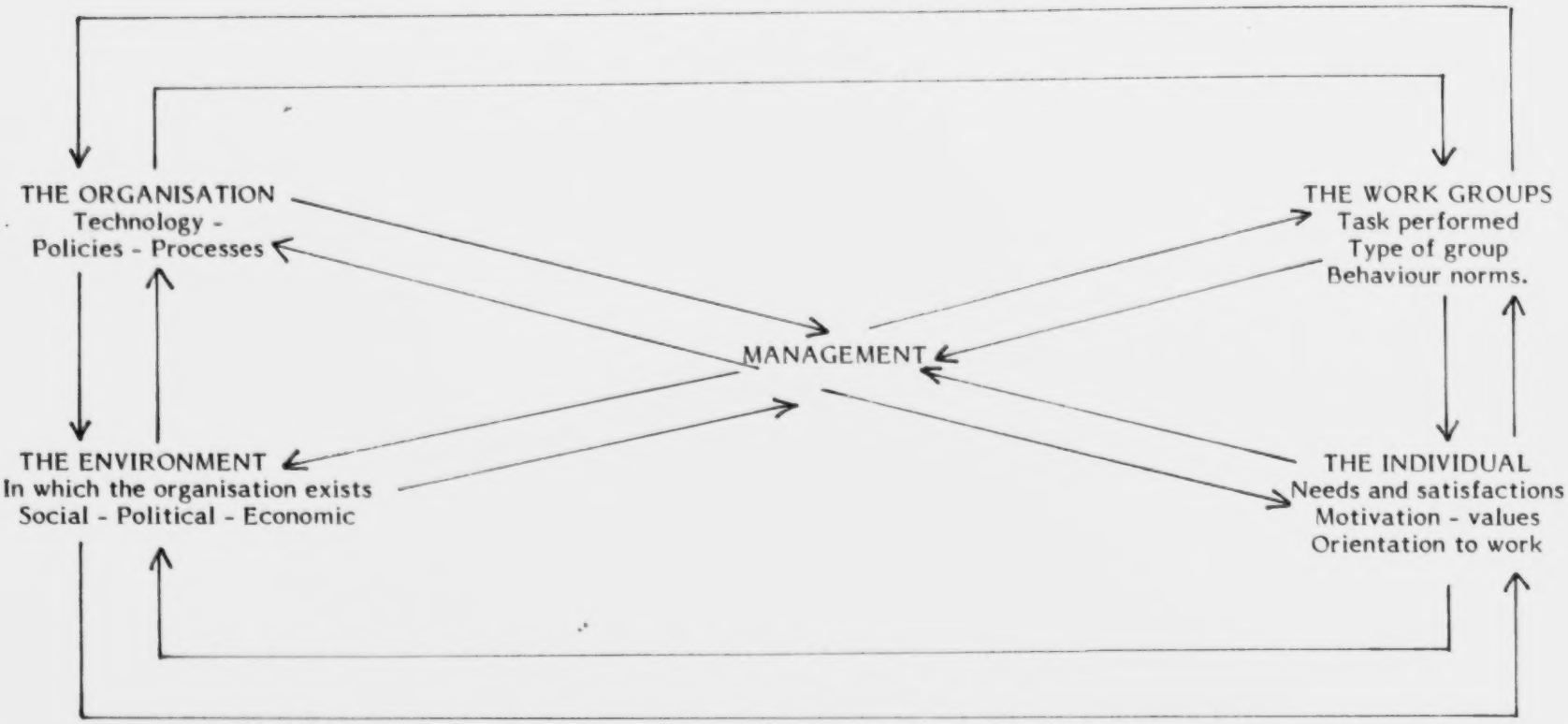


FIGURE 1.3 THE CONTINGENCY APPROACH - Major factors influencing management

In the contingency approach, the scientific process, human relations and other approaches to management are but tools of management to be applied in a selective manner to a particular situation.

The contingency approach has not been without its critics, and criticisms applied to it have been along the following lines:-

i) The approach could just as well be called the "it all depends" approach because it implies that there are no universal rules or techniques to apply to all situations.

ii) The approach also implies that managers are not free to manage in a way that fits their personal bias because it claims that given certain combinations of contingencies it is possible to specify approaches that are more likely to be effective than others.

iii) The application of the contingency approach depends too much on the conceptual skills of the manager.

Clearly the approach will be difficult to realise at times and in part this difficulty is because of the incomplete development of earlier approaches. Nevertheless it does seem to offer a practical and effective framework for the application of management thought to real management problems taking into account the particular situation faced by a particular manager at a particular time.

NOW TURN TO **ACTIVITY C** ON PAGE 8 OF THE BOOKLET OF SUPPLEMENTARY MATERIAL

and when you have finished go on

to

ACTIVITY D ON PAGE 17

1.6 CONCLUSIONS

In section 1 we have examined the concepts of the organisation and the manager and met in outline four major approaches to the study of the problems of management:-

- the scientific approach
- the process approach
- the human relations approach
- the contingency approach.

We shall meet these perspectives again, in more detail, in later sections of the course.

NOTES

SECTION 2

MANAGEMENT ACTIVITIES - ANALYSING THE JOB DESCRIPTION

OBJECTIVES

On completion of this section you should be able to:

i) Outline the main characteristics of a job description.

ii) Discuss some of the limitations of a job description.

iii) Analyse a job descripion using the classical approach.

iv) Keep and analyse a work diary.

v) Identify the management activities which your own job involves.

2. MANAGEMENT ACTIVITIES - ANALYSING THE JOB DESCRIPTION

2.1 INTRODUCTION

There have been a number of attempts to look at the job activities of managers. Some studies have made comparisons between jobs in terms of the extent of the managerial responsibilities involved. These studies have, in the main, been concerned with devising appropriate salary scales. The work of Jacques[1] and Brown[2] provide examples of this type of study.

Rosemary Stewart[3] has adopted the approach of examining and analysing the way in which managers spend their time, whilst other researchers have analysed leadership styles[4] and the roles a manager plays[5].

Other studies have followed the classical approach. In Section 1 we looked at the basic features of a number of approaches to the study of management. From one of them, the so-called "process" approach[6] comes the suggestion that the activities of a manager can be classified into a number of separate categories. Most management theorists are in broad agreement about these activities although the exact number and naming of the categories may vary. In this section we will use an adaptation of the categories suggested by Fayol as a basis for analysing the management job in practice.

Fayol suggested the categories:

planning
organising
commanding
co-ordinating
controlling

For our purposes we shall add the process of forecasting[7] to the list and use, in common with most contemporary writers, the term "motivating"[8] as an alternative to Fayol's "commanding". The six categories are shown in Figure 2.1.

forecasting
planning
organising
motivating
co-ordinating
controlling

Figure 2.1 SIX MAJOR MANAGEMENT ACTIVITIES

Most jobs are based on a job description which sets out the tasks required of the job holder.

Is it possible to classify the immense variety of tasks set out in a typical job description into the six categories listed? We shall now see how this can be done.

---

(1) Elliott Jacques "The Time Span of Discretion" Heinemann
(2) William Brown "Exploration in Management" Penguin
(3) Rosemary Stewart "Managers and their Jobs" Pan.
(4) W.J. Reddin "Managerial Effectiveness" McGraw Hill (1970).
(5) H. Mintzberg "The Managers Job - Folklore and Fact" Harvard Business Review 1973.
(6) This book p.14.
(7) Set book p.151, 171
(8) Set book pp.477 - 481

2.2 WHAT IS A JOB DESCRIPTION?

Before attempting a classify its components, we need to consider what a job description is.

Most authorities regard a job description as a useful if limited management tool. It can aid organisational planning by determining the allocation of duties. It is also helpful in manpower planning and in the identification of training needs.

In brief, a job description provides:

i) a guide to the activities a specified job involves.

ii) an outline of the contribution expected from the job holder.

iii) a specification of the methods to be employed to reach job objectives.

iv) a definition of relationships to other functions and individuals.

v) an indication of the nature of the information needed to carry out the job and a specification of the information required from the job holder.

2.3 LIMITATIONS OF THE JOB DESCRIPTION

No job description can specify every aspect of the contribution to be made by an individual. This is certainly true of managers. A manager's effectiveness is significantly influenced by his insight into his own work and this insight is likely to be only partially reflected in the job description.

A job description is static rather than dynamic. How can one, for example, write an adequate job description to cover the range of emergencies a worker in a hospital casualty department might meet?

It is also difficult to specify in detail all the information a manager needs to do his job efficiently. For example, the knowledge of personal details which is a significant factor in determining the nature of relationships with others.

Job descriptions cannot communicate and create the conditions necessary for people to be motivated to perform effectively. As Reddin[1] points out, they focus on the less important input end rather than on the more important output end.

Job descriptions cannot avoid specifying minimum acceptable behaviour. This has its dangers as they can, all too easily, become 'rule books' to be used in bargaining. In these circumstances the 'minimum' often becomes the norm.

Having said all this, job descriptions can provide a useful elementary format for analysing work activities.

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(1) W.J. Reddin "Managerial Effectiveness" McGraw Hill (1970)

2.4 ANALYSING MANAGEMENT TASKS

Let us remind ourselves of Fayol's five categories of management function and activities to which we have added a sixth - forecasting.
These are:

forecasting
planning
organising
motivating
co-ordinating
controlling

Here are some examples of activities which might be undertaken by a manager, together with a suggested analysis leading to their classification.

Example (i)

Programming annual leave for departmental staff.

Analysis
This activity involves an attempt to determine the sequence and timing of future events and is therefore a PLANNING ACTIVITY.

Example (ii)

Arranging for new staff to be introduced to their duties through an induction programme.

Analysis
This job also involves PLANNING but because it also requires the activities needed to achieve the objective to be determined and the work classified and assigned to other people it is also an ORGANISING activity.

Example (ii) illustrates the important point that a single management task may involve more than one management process.

Example (iii)

Encouraging qualified staff to use their specialised knowledge to teach new staff.

Analysis

This task involves MOTIVATING specified members of staff to behave in a particular way in the interests of the organisation.

Example (iv)

Periodically reviewing the standard of work using set procedures and criteria.

Analysis

This job involves checking performance against plans and targets and is therefore best classified as a CONTROLLING activity.

In a moment try your own hand in ACTIVITIY E, classifying some examples from actual job descriptions. Before starting the activity there are a number of points to bear in mind in undertaking this type of classification.

i) You may find it difficult when considering a management task to choose between two or more component activities. Do not let this worry you. As we have already seen a particular task may well involve two or more different activities. If it does, list them all.

ii) It is not uncommon that a management task is worded in very general terms in a job description:

For example:

"maintaining an efficient production service" covers a lot of ground.

The best way to tackle broad tasks of this nature is to rewrite them for yourself in greater detail using your experience of the task, or observations of others performing the task to guide you.

iii) You may find that some of the management functions/activities appear to be involved in each and every one of your management tasks. This could mean that the activity concerned is too general and too loosely defined to be of meaning.

This allegation has been made about the activity of co-ordinating which tends to crop up a lot in analyses of job descriptions. If you find this happening in your analyses you may wish to try to think of substitute activity title(s) which are more useful to you.

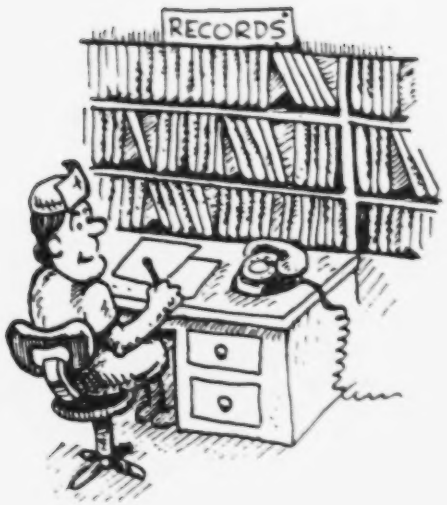
NOW GO AHEAD AND COMPLETE **ACTIVITY E** WHICH YOU WILL FIND ON PAGE 20 OF THE BOOK OF SUPPLEMENTARY MATERIAL.

2.5 ANALYSIS OF A FULL JOB DESCRIPTION

You should by now be feeling more confident of your ability to sort out the management activities involved in a variety of management tasks.

We can now be more ambitious and apply the process to a complete job description, using an example from the Public Sector.

On the next page is the job description for the Nursing Officer, at a General Hospital engaged in training.



BLANKSHIRE AREA HEALTH AUTHORITY
JOB DESCRIPTION

Title: Nursing Officer - Training and Personnel Blankshire Hospital

Responsible to: District Nursing Officer

Job Summary: The Nursing Officer will have duties covering the general aspects of Personnel as relating specifically to Nursing Staff and Training of In-Service Staff, together with help in multi-disciplinary training. The work will, therefore, be subject to monitoring by the District Personnel Officer and co-ordination with the District Training Officer. Hours may include evenings and nights.

Principal Duties and Responsibilities:

1. Consult with District Personnel Officer and staff on development and progress of personnel policies as they may affect nursing staff throughout the District. (i.e. National, Regional, Area and local policies), inform and interpret same to Nursing colleagues.
2. Receive, process and advise on all nursing appointments.
3. Collaborate with District Training Officer on Induction programme for all staff.
4. Liaise with Director of Nurse Education and other Nursing Offices on provision of In-Service Training programmes.
5. Provide statistical and advisory information on the use of resources in the Nursing Service.
6. Keep up-to-date with current trends in professional matters and technology by liaison with all District Officers and Heads of Departments and by reading professional journals, informing Nursing colleagues as appropriate.

Training Professional

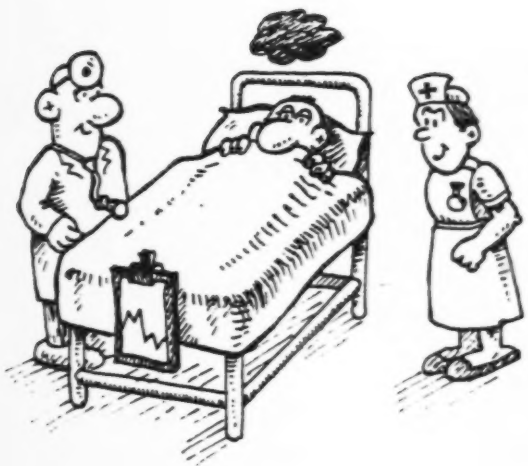
7. Research and assess with the co-operation of service colleagues, the post-basic needs of all trained nursing staff within the District.
8. Research and assess with the co-operation of service colleagues, the post-basic needs of all untrained nursing staff within the District.
9. Develop contacts with departments outside nursing in order to co-opt experts from other fields.
10. Be an active member of the Nursing Procedures Committee and Nurse Education Committee.
11. Encourage staff to research their own areas of speciality where appropriate and provide any such help as may be required and justified.

Administrative

12. Arrange In-Service Training Courses and Study Days for all grades of nurses (except Learners) throughout the District, according to their needs.
13. Maintain knowledge of all unit activities and the teaching potential within them.
14. Liaise with all Divisional Officers with particular reference to the Education Division, on course content.
15. Organise "Return to Nursing and Midwifery" Courses.
16. Keep District Nursing Officer and District Personnel Officer informed of financial implications of In-Service Training Programme and obtain approval for Training Programme.
17. Liaise with District Training Officer and other Departments regarding training rooms, facilities and equipment.
18. Develop channels for dissemination of Courses and Conferences information to Nursing Staff.
19. Receive reports of Course Evaluations and follow-up with post-course performance data.
20. Supply to Senior Nursing Management, Reports on Course/Conference evaluations.

21. Attend Nursing Officer Meetings and Unit Meetings as required.
22. Organise observation visits for staff to the various divisions and other areas of interest.
23. Ensure maintenance of records of training in an appropriate manner. Record all courses held and the names of staff attending.
24. Establish and maintain a register of staff with teaching ability or potential, in nursing sphere.

This job description will be subject to change in the light of experience and the requirements of the service.



In table 2.1 on the next page we have attempted to analyse the twenty-four management tasks included in the job description. Spend a moment or two checking the analysis against the job description.

You will see that a total of 37 checks have been made in the columns representing management activities and that the total number of checks made in each column varies from 3 in the columns representing "motivating" and "forecasting" to as many as 12 in the controlling column.

The balance between the activities represented gives an interesting flavour of the individual manager's work.

In particular the balance between planning and controlling activities tends to indicate the level to which the job belongs in the management hierarchy. In higher level posts the balance tends to shift in the direction of planning, for example, setting future standards of performance, budgets and the like. At lower levels the emphasis may be on "controlling" - seeing that these targets are met.

NOW TRY YOUR HAND AT **ACTIVITY F** ON PAGE 23 OF THE BOOK OF SUPPLEMENTARY MATERIAL.

THE ACTIVITIES OF A MANAGER - ANALYSIS OF A JOB DESCRIPTION
NURSING OFFICER, TRAINING AND PERSONNEL - BLANKSHIRE AREA HEALTH AUTHORITY

TASK NUMBER	FORECASTING	PLANNING	ORGANISING	MOTIVATING	CO-ORDINATING	CONTROLLING
1		✓		✓		✓
2			✓		✓	✓
3		✓			✓	
4					✓	
5						✓
6						✓
7	✓	✓				
8	✓	✓			✓	
9		✓				
10					✓	
11		✓		✓		
12						✓
13	✓					✓
14				✓	✓	
15		✓	✓			✓
16						
17		✓				
18						✓
19						✓
20			✓			✓
21					✓	
22			✓			
23						✓
24						✓
COLUMN TOTAL	3	8	4	3	7	12

TABLE 2.1 TOTAL: 37

2.6. CONSIDERING THE IMPLICATIONS OF THE ANALYSIS

In considering the results of the analysis of your job description you may have been surprised to see how much managing you are actually required to do. How much you shape and organise resources; people, as well as equipment, materials and money; to achieve particular aims.

You will have noticed the balance between "planning" and "controlling" activities in your job and may have contrasted this balance with that shown in the other analyses you are now familiar with. There is an interesting expansion of this idea in Rosemary Stewart's book which has already been referred to[1].

An analysis of a job description can be even more revealing if more sub-classifications are included. For example, you could divide some of the columns on the analysis chart to enable a distinction to be made between managing people as opposed to things.

Obviously not all the columns can be split in this way. It wouldn't make much sense, for example, to talk of motivating 'things'.

Finally, as a summary of this section, we have provided you with a model classification of a number of typical management activities. This is shown as Figure 2.3.

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(1) Rosemary Stewart 'Managers and their Jobs' Pan Book (1970) pp. 146/7

FORECASTING	PLANNING	ORGANISING	MOTIVATING	CO-ORDINATING	CONTROLLING
Analysing past and present trends. Making sound predictions and anticipating events. Selecting from alternatives Remaining flexible. To determine objectives and policies.	Determining 1. Sequence of events. 2. Timing of events. 3. Methods to be used. 4. Resources required. To produce programmes, schedules, procedures, budgets.	Determining 1. Total task requirments to achieve objectives 2. The division of the total task into man-units 3. The grouping of man-units To establish an organisation structure.	1. Selecting individuals for each task. 2. Training. 3. Delegating. 4. Decision making 5. Motivating. To give the organisation life.	1. Maintaining harmony 2. Maintaining balance. To ensure unity of effort.	1. Devising and measuring systems and media at all levels. 2. Comparing actual with planned performance. To initiate action and get required results.

FIGURE 2.3. SOME TYPICAL MANAGERIAL ACTIVITIES CLASSIFIED

2.7 THE WORK DIARY

Now that you have subjected your own job description to a thorough analysis you may have begun to ponder on the limitations of such a device as a representation of the reality of day-to-day work.

A useful check is to keep a Work Diary.

Figure 2.4 shows a typical diary kept for a single day by William Johnson, Cost Office Manager.

You will see that the form allows for the analysis of the tasks revealed by the diary in the same way as the job description analysis.

NOW TURN TO **ACTIVITY G** ON PAGE 28 OF THE BOOK OF SUPPLEMENTARY MATERIAL.

AIRFLOW PUMP AND IMPELLERS

WORK DIARY AND ANALYSIS SHEET

Name.....William Johnson..... Position .....Cost Office Manager..... Date .....1 May 1981.....

TIME	DESCRIPTION OF WORK	Management Activity					
		Forecasting	Planning	Organising	Commanding	Co-ordinating	Controlling
9.00 - 9.30	Sort out material delivery notes and requisitions sent from stores						
9.30 - 12.00	Prepare cost analysis for next financial year at request of M.D.						
12.00 - 12.30	Determine new cost codes for new pump						
12.30 - 1.00	Issue cost codes to costing staff for use as from 1st June						
1.00 - 2.00	Lunch						
2.00 - 2.30	Attend chief engineers meeting to discuss new pump production plan						
2.30 - 3.45	Discuss last week's cost figures with junior staff - check against cost estimate.						
3.45 - 4.30	Interview for new cost clerk						
4.30 - 5.30	Review material costs for previous month and calculate variance analysis						

FIGURE 2.4

2.8 ANALYSIS USING THE CONTINGENCY APPROACH

So far in this section we have used the process model to analyse job descriptions and work diaries. You will recollect that in Section 1 we utilised the concepts of the contingency model to analyse the case study "The New Job". It is also possible to undertake a contingency analysis of job descriptions and work diaries.

Write in the space below two or three sentences to describe the main features of the contingency approach.

THE CONTINGENCY APPROACH

In your summary above you will probably have emphasised the attempts made in the contingency approach to unify the perspectives offered by the other approaches we have examined into a single body of knowledge.

We are concerned in the contingency approach with an attempt to decide, on the basis of analysis, which is the most effective way to handle a problem in a given set of circumstances.

The major emphasis of the approach is on the effective diagnosis of:

i) The external environment of the organisation.
ii) The internal organisation and its technology.
iii) The work group
iv) The individual

In the final activity in this section try to analyse a single day's work diary in terms of the factors listed above.

NOW TURN TO **ACTIVITY H** ON PAGE 40 OF THE BOOK OF SUPPLEMENTARY MATERIAL.

2.9 CONCLUSIONS

In this section we have considered and attempted to apply the "classical" and "contingency" approaches to management.

You may have decided that the classical approach produces general rules which are useful but limited in that they may fail to hold when circumstances vary.

The contingency model aims to offer a more flexible approach by allowing for various combinations of circumstances affecting the issue for which our effective course of action is sought.

It is important to regard these two theories, along with others dealt with in Section 1, as complementary to each other.

We now move on to Section 3 which concentrates on the "organisation" as an aspect of management. This will be concerned with the nature of an organisation structure which is set up by dividing and grouping people into functions and units in order to achieve the total task of meeting the objectives of the organisation.

SECTION 3

ORGANISATIONAL STRUCTURES

OBJECTIVES

On completion of this section you should be able to:

i) Discuss significant differences amongst meanings attached to the term "organisation".

ii) Distinguish between formal and informal organisation frameworks.

iii) Distinguish between line and staff relationships.

iv) Explain the meaning of the terms "functional authority", "charismatic authority", "sapiental authority", and "referent authority".

v) Draw a simple organisation chart of that part of the organisation within which you work.

3. ORGANISATIONAL STRUCTURES

3.1 THE NATURE OF ORGANISATION (1)

In section 1 we noted that an organisation exists if people combine their efforts for a common purpose.

The term organisation is used to refer to the system which exists within an enterprise to ensure the allocation of tasks to the individuals who make up the enterprise and to the relationships which exist amongst the individuals within the system.

In the process of defining tasks, relationships between individuals are established. These relationships are 'authority' relationships, which as we shall see can be traced by following lines down an organisation chart, and 'responsibility' relationships, which can be traced by following lines upwards. Formal relationships in an organisation are not ends in themselves, but are set up to enable an organisation to achieve its objectives (2).

The production department of Airpress in these terms is clearly an organisation: many people integrate their activities in the interest of production. The organisational structure is intended to reflect the objectives of the company by providing for the co-ordination of all company staff and resources to meet the needs of the customer.

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(1) See Set Book (Glossary) p.662 for several meanings of the term 'organisation'.

(2) See Set Book p.231

To meet these needs a large number of complementary roles have been created and the requirements of each role are specified, often in a job description (see Section 2.2). In addition to the tasks and duties which form the bulk of the job description, it is usual to specify both the authority the job-holder will have and the person to whom he or she is responsible.

The network of relationships thus defined, is the formal organisation structure and shows intended relationships.

However, apart from this systematically designed organisation structure of jobs for people to do, and targets for them to meet, there always exists within the group a spontaneous 'informal' organisation based on the social relationships developed by individuals to give 'life' to their formal relationships(1). Unlike the formal organisation where much conscious effort goes into co-ordinating the efforts of members in the pursuit of given objectives, the informal organisation consists of the joint personal activities of people acting voluntarily together.

Within the informal organisation, workers do not limit themselves to purely 'co-ordinating' their work; they eat together, complain about common problems, and often go beyond what their job description requires to cause targets to be met. It is important to note that this is not just a social structure, although some social activities may be involved.

It is perhaps worth asking the question whether one incentive to the establishment of an informal organisation lies in the tendency to structure the formal organisation into very large units with which few people can identify. Employees want more than money from their work; they

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(1) See Set Book pp.232 - 233

need social contact and opportunities for social comparison. They seek norms of behaviour and approval for their achievements (1). Some at least of this approval will come from the informal organisation.

The informal organisation is not something subversive of the formal structure, rather it serves the equally important purpose of satisfying peoples' needs for support and approval from their equals, and for challenges, responsibilities and achievements. Factors which draw members together in informal networks include age, sex, race, religion and politics. More obviously, members of an informal group may share a common skill.

As informal groups develop, they affect the behaviour of individual members by developing norms, standards of behaviour, attitudes and values to which the group conforms. A leader may emerge who has no designated leadership role in the formal organisation, and the group will protect members' rights against "outsiders".

The existence of an informal organisation and informal leaders has many implications for managers i.e. people with formal leadership roles. These implications are considered later in the course.

(1) See Set Book p.489

3.2 ORGANISATIONAL RELATIONSHIPS

Textbooks of management often distinguish between 'line', 'staff', and 'functional' relationships in organisations[1].

These may be distinguished as follows:

i) LINE relationships are those existing between a senior and subordinates i.e. between a person in authority and anyone with responsibility directly to that person. Some authority is delegated by the senior to the subordinate in order that he or she may carry out the assigned tasks.

In many companies there is more than one 'line' organisation. There is one that links the Sales Dept; another linking the Production Dept., yet another linking the Personnel Dept; and so on.

ii) STAFF relationships exist in two forms:

a) Assistants

An assistant is appointed simply to assist with the work load of a superior and has no authority. An assistant can act only in the name of the superior and on his direction.

b) Staff Specialists

Here individuals are appointed to offer specialised information (for example, on labour law) and/or advice (for example, on industrial relations) to managers in the 'line' structure, but without authority to insist that the advice is taken.

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(1) See Set Book pp.284 - 290 et seq., for a more detailed discussion of line, staff and functional relationships.

iii) 'FUNCTIONAL relationships arise when a specialist is designated to provide a service which compels the activity of a line manager. The specialist's authority comes by delegation from a common superior. In other words the boss has decided that rather than having every piece of advice 'cleared' through his department, the specialist concerned may issue it as an instruction to the line managers concerned.

Functional specialists remain accountable, of course, to the 'boss' in whose name they issue instructions. Their performance will be 'monitored' by the specialist in their function at the next higher level e.g. the Company Personnel Officer will be monitored by the Regional Personnel Officer but will remain accountable to the Company Chairman.

3.3 ORGANISATION CHARTS

By now you will have almost certainly come to the conclusion that the pattern of relationships in an organisation structure is inevitably complex. To clarify these relationships it is often helpful to draw a chart showing the relative positions of individuals within an organisation.

A chart can be prepared from job titles or job descriptions. If job descriptions are used keep in mind the limitations which were discussed in Section 2.

The idea of such a chart is quite familiar[1]. Typically it is composed of a series of boxes, each containing a role title, linked together by lines indicating channels of authority and responsibility. A simple organisation chart is illustrated in Figure 3.1.

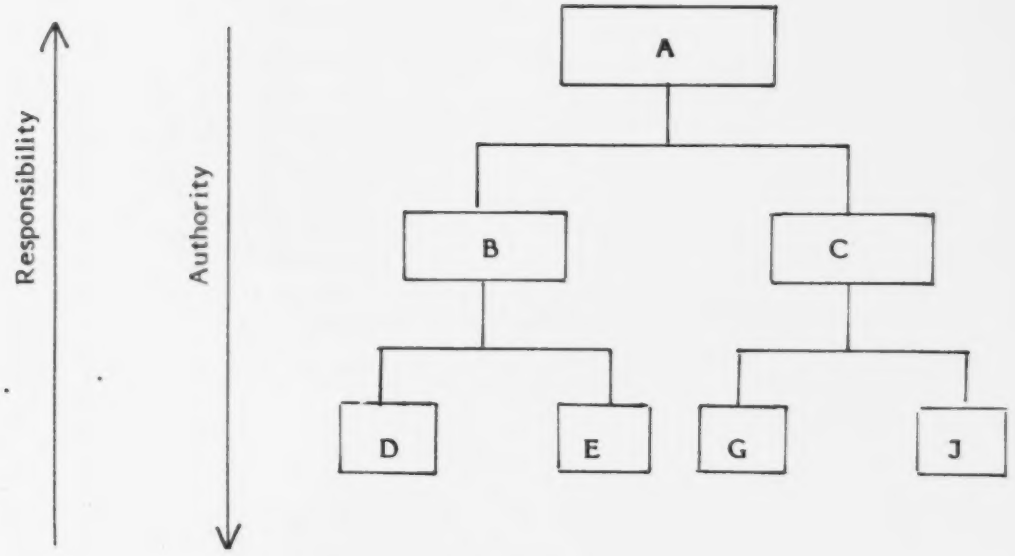

FIGURE 3.1

A Schematic example of an organisation chart.

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(1) See Set Book pp.363 - 364 for a discussion of the advantages or limitations of organisation charts.

This chart indicates that "A" plays the "boss" role in the total organisation depicted. Similarly B is the Boss of D and E as is C of G and J. This is a managerial hierarchy; a system of roles built on layers of managerial authority and responsibility.

The chart also appears to indicate that D, E, G and J are of equal rank as apparently are B and C. In drawing up an organisation chart it is important to ensure that what we mean is what we draw. Look, for example, at Figures 3.2(i) and 3.2(ii).

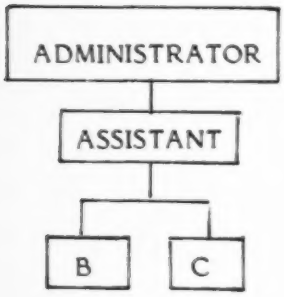

FIGURE 3.2 (i)

OR

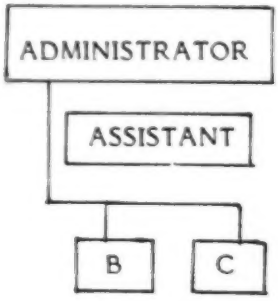

FIGURE 3.2 (ii)

THE REPRESENTATION OF AN ASSISTANT IN AN ORGANISATION CHART.

Figure 3.2(i) indicates that the assistant has authority over and responsibility for B and C. We have already considered the role of an assistant who can only act with his supervisor's authority. Clearly there is something wrong with the first chart.

The correct position is represented by Figure 3.2(ii). This illustration shows quite clearly that it is the administrator and not the assistant who exercises authority over B and C.

If our administrator required 'functional' assistance to be given to his subordinates, for example, in relation to staff discipline, he would have to delegate some of his authority to the functional manager concerned. Our chart would have to indicate this aspect thus:-

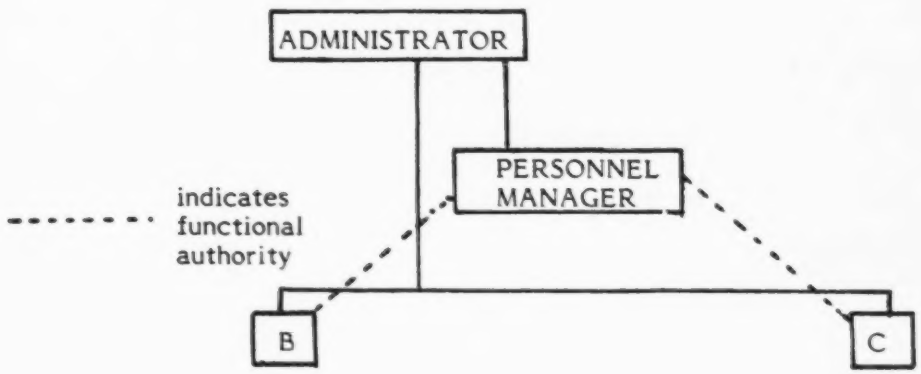

FIGURE 3.3.
THE REPRESENTATION OF FUNCTIONAL AUTHORITY IN AN ORGANISATION CHART.

The personnel and training functions in an organisation are often structural so as to use functional authority.

There is another problem inherent in the construction and use of charts representing a large organisation. This is related to the existence of salary grades and bands. It is not uncommon for several subordinates on different salary grades to be of equal rank, that is in level of organisational role in the hierarchy. Since the chart is an authority structure and is intended to show rank, the problem of grade is usually ignored and, if necessary, a footnote is added to the chart to the effect that the levels on the chart do not necessarily provide an accurate indication of rank or salary grade.

Finally it is important to bear in mind that an organisation chart is only a diagram of the formal relationships supposedly existing between the offices (roles) in an organisation. Thus the chart indicates positional authority. There are other important kinds of authority which are very difficult to chart.

One of these additional aspects of authority is termed 'sapiential' authority. It arises in the wisdom and knowledge displayed by an individual. The staff specialist described earlier in this section operates in part with 'sapiental' authority. A second type of authority is referred to as 'charismatic'. Charismatic authority grows out of personality characteristics and reputation. A third type of authority 'referent' authority is delegated by a superior to an assistant. This type of relationship is also described earlier in this Section.

In an organisation chart relationships are plotted on the basis of characteristics which are independent of the individual who is holding the job at a particular time.

In order to test your understanding try organisation charting for yourself.

TURN TO ACTIVITY J ON PAGE 43 OF THE BOOK OF SUPPLEMENTARY MATERIAL.

The brief exercise you have now completed will have alerted you to some of the practical difficulties to be encountered in charting organisations. In a detailed organisation chart - think of Airpress as an example, a complex range of additional relationships will need to be shown. These include:-

i) Individual accountability - normal line management

ii) Joint team responsibility - line management by consensus.

iii) Functional responsibility - staff management with delegated authority.

iv) Monitoring - surveillance and co-ordination of activities

v) Representative - representation of the interests of specific groups at important points in the organisation.

vi) Liaison - consultation and liaison with, for instance, local authorities, professional bodies, CBI and Training Boards.

vii) Informational - giving and receiving information. To the Public, the consumers, the trade or industry.

FINALLY

You have now completed the study of your position and role within the management framework. Other more specific topics will be covered in separate modules and these can be discussed with the course tutor or programme manager.